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Sweden

Exporter Guide

Annual

Approved By:
Mary Ellen Smith
Prepared By:
Bettina Dahlbacka

Report Highlights:
Due to severe Nordic winters and its relatively short growing season, Sweden relies heavily on imported food and agricultural products. There are opportunities for high-value products, products which are not produced domestically and new-to-market products, including ethnic, healthy and organic food and drink products.

Post:
Stockholm

Author Defined:
SECTION I. MARKET OVERVIEW

Due to the severe Nordic winters and relatively short growing season, Sweden relies heavily on imported food and agricultural products. In 2010, imports of agricultural and food products totaled SEK 95 billion (USD 14 billion) and accounted for 9 percent of the Swedish total import value. About 59% of the imports come from other EU countries; Norway, Denmark, The Netherlands and Germany are the main exporters. The US share is less than 2%. Sweden has been a member of the European Union (EU) since 1995, but has not joined the European Monetary Union (EMU).

Food retail sales in 2010 stayed about the same as in 2009, up by only 1.8% to SEK 253 billion (USD 38 billion). This can partly be explained by price increases on certain food products, but mostly by the fact that the food industry is considered counter-cyclical and perform well during economic setback but weaker in the beginning of an economic upturn.

Sweden was hit hard by the international financial crisis in 2008, but the Swedish economy recovered strongly in 2010 resulting in a GDP growth rate of 5.5 percent. However, according to recent reports from the National Institute of Economic Research (NIER), Sweden's economy has slowed to a halt. NIER is revising down expectations for the Swedish economy and expects GDP growth to slow down sharply in 2012. Unemployment is expected to remain unchanged at 7.5 percent in 2012 and in 2013 to decline to 7.3 percent.

Table: Selected Indicators
Annual percentage change and percent, respectively

	2010	2011	2012	2013
GDP at market prices	–5.7	4.3	1.9	3.4
Real GNI per capita	–7.2	2.6	3.0	2.5
Employment	1.1	2.1	0.6	1.0
Unemployment	8.4	7.5	7.5	7.3

Sources: Statistics Sweden, National Mediation Office and NIER.

Swedish consumers are gravitating towards fresher, more convenient and more nutritious foods. High demands are made on food quality, origin and environmental concerns. Quality is now associated with assurances or production conditions, which range from the use of fertilizers and pesticides to animal welfare and environmental concerns. There is a growing taste for organic products. Consumers are willing and able to pay higher prices for food and drink products that fall into these categories.

Advantages	Challenges
Sophisticated market. High acceptance of new products and concepts. U.S. products are considered high quality and trendy.	U.S. products are at a price disadvantage compared to competitors based in the European Union.
Growing consumer demands for value-added products, convenience foods and functional foods. Proliferation of "healthy" and "greener" foods.	Strong hesitations with respect to genetically modified products.
Location gives access to a Nordic/Baltic market comprising 25 million consumers.	High distribution and shipping costs.
High standard of living, well educated workforce, growing incomes. English is widely spoken.	
Favorable dollar exchange rate.	

Trends in Imports from the United States of Consumer-Oriented, Agriculture, Fish & Forestry Products

Product Category	**2010 US Exports to Sweden $1,000**	**Growth 2009-2010**
Processed fruits & vegetables	39,817	9.53
Tree Nuts	18,228	25.42
Wine & Beer	14,882	4.37
Other consumer oriented	13,334	23.01
Other Value-Added Wood Products	11,837	60.25
Other Edible Fish & Seafood	10,486	53.09
Hardwood lumber	8,144	4.75
Live Animals	6,946	4.17
Other Intermediate Products	6,763	-4.48
Logs and Chips	6,348	37.28
Panel Products	5,269	78.14
Eggs & Products	4,799	147.70
Fresh Fruit	3,866	-3.65
Roe & Urchin	3,536	18.49
Snack Foods	2,521	-13.20
Dairy Products	2,012	-1.15
Rice	1,890	-8.85
Pet Foods	1,592	53.11
Vegetable Oils	1,179	4.78
Fresh Vegetables	1,018	1405.9
Other	6,466	
Total Ag Fish & Forest Products	**170,933**	**17.18**

Source: U.S. Bureau of the Census Trade Data

SECTION II. EXPORTER BUSINESS TIPS

Local Business Practices and Customs

Swedish firms do not change suppliers readily, and many commercial relationships have been built up and maintained over decades. While this is beneficial to exporters who have a partner, newcomers must be willing to invest effort in developing an entry into this market and securing the confidence of commercial buyers. A Swedish buyer will expect total commitment to prompt deliveries, precision in filling of orders and high quality for all kinds of products. Being punctual is not only regarded as a sign of respect, but also efficiency. Swedish businessmen will have little understanding for cultural variation in punctuality.

Market entry strategies for U.S. food products should include:

1. Market research in order to assess product opportunities.

2. Advance calculation of the landed cost of a product in order to make price comparisons vis-a-vis competitors.

3. Identifying an experienced distributor or independent reliable agent with strategic distribution channels to advise on import duties, sanitary regulations, and labeling requirements. It is advisable to initiate personal contact in order to discuss marketing matters such as funding for advertising, slotting allowance, in-store promotions and tasting events. Suppliers may also want to consider trade fair participation to raise awareness of their products.

4. Exploration of the purchasing arrangements of the larger retail chains.

General Consumer Tastes and Preferences

Convenience: Swedes are embracing value-added products and convenience foods. In-store eating and take-away is growing. The ongoing socio-demographic changes with busier life styles and increasing single-person households are affecting food retailing to a high degree. Retailers are shifting their produce ranges towards an increasing share of healthier, ready-to-eat foods and home meal replacements. Lifestyle changes also significantly influence the catering sector. In Sweden about 20 percent of meals are currently eaten outside of the home.

Health: Hand-in-hand with the demand for convenience goes the heightened consumer concern for food safety and healthy eating habits. Demand is rising for "natural" and "healthy" food and drink products. Also, products with nutritional advantages, such as added fiber, vitamins and minerals are gaining in popularity. The environmental or "green" philosophy is an important factor in consumer decisions. Swedes are willing and able to pay higher prices for food and drink products perceived to meet their environmental and health concerns.

Organic: Consumer interest in organic food products has been increasing rapidly in Sweden in the past few years. While growing demand for healthier, "greener" and more convenient products is one of the major driving forces behind the evolution of the food industry, organic and health-oriented products still have a relatively small market share in Sweden. In 2010, sales of organic products increased by 11% and had a share of 3.1% of the total food market, which include retail, Systembolaget (alcohol monopoly) and HRI. Organic is growing in all sectors, but Systembolaget accounted for the largest increase of almost 40%. Best opportunities for U.S. organic products lie in processed products, where the variety and availability in Sweden is still much more limited than that found in the United States, for example canned and dried beans, corn, chili, dried fruits and nuts.

Vegetarian: The trend towards vegetarian choices is a growing one. More processed products which link convenience to the vegetarian alternative are appearing in retail outlets but are still limited in variety.

Ethnic Foods: Swedish consumers are moving away from their culinary traditions as they become more open to new and exotic cuisine. A growing immigrant population and extensive travel abroad are the main reasons behind this trend.

Food Standards and Regulations

Sweden has been a member of the European Union since 1995 and has adopted EU practices related to imports of agricultural products. Agricultural products are subject to the standard EU import licensing system, quotas, import duties and other provisions. It is important to note that these markets are fully open to competitors within the EU, while U.S. exporters face EU import restrictions.

Food safety standards in these markets are very strict and imported foodstuffs must meet specified requirements.

Swedish national food legislation is, to a large extent, harmonized with the EU's food legislation. In certain cases, however, there is room for national interpretation of the EU's legislation. Sweden applies more restrictive legislation with regard to irradiation, under the umbrella of public health precautions. In addition, Sweden has received a derogation allowing it to apply stricter salmonella control and stricter border controls (quarantine on imports of live animals) than that of other EU member countries.

Sweden applies EU maximum residue levels with regard to dioxin. Due to the relatively high dioxin levels in fish from the Baltic Sea, however, Sweden (and Finland) has received a derogation allowing fish with dioxin levels exceeding the EU thresholds to be sold in Sweden under the condition that they are not exported to other EU countries. This exception will become permanent in January 2012.

Import and Inspection Procedures

Sweden has strict sanitary and phytosanitary requirements for foods. Laboratories have sophisticated capabilities to monitor product quality. Detailed regulations apply to the importation of agricultural products into these markets. It is therefore most important that the U.S. exporter work closely with the importer to make sure that the products destined for this market are in full conformity with the country's food safety, quality and labeling rules and regulations.

Please note that all foodstuffs sold in Sweden must be labeled in Swedish. Many products intended for wide distribution in the region are labeled in multiple languages such as Swedish, Norwegian, Danish, Finnish and English.

For more information regarding food standards and import regulations, please refer to USEU FAIRS Report and Sweden FAIRS Report available on the Foreign Agricultural Service web page at: http://gain.fas.usda.gov/Lists/Advanced%20Search/AllItems.aspx

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

Retail

In the past few years, a Nordic consolidation and integration has clearly been seen as mergers between the Nordic retailers have been implemented. At the same time, the Nordic countries have increasingly become part of the European retail market as foreign companies and chains are moving in.

Retailers are facing stronger competition from fast food chains, lunch restaurants, and other service establishments. During the past decade, sales within the restaurant sector have increased faster than in the retail sector. Eating out has come to include both weekdays and weekends. Nevertheless, Swedes still spend the bulk of their food dollar in retail stores rather than eating out.

General discount stores, hypermarkets and large supermarkets are experiencing rising sales volumes, while small and medium-sized stores lag behind. Elements of the restructuring of the sector include the on-going move toward vertical integration, the increasingly common use of exclusive contracts, consolidation of purchasing and deliveries and the growth of private labels. Supermarkets are responding to demands for an ever-widening list of products and product formats. Large supermarkets and hypermarkets account for about 75 percent of the Swedish retail food sales.

Distribution: The wholesale and retail food market in Sweden is dominated by four groups, Ica, Coop, Axfood and Bergendahls, which together account for over 90 percent of the commodity retail market. These Nordic chains have closely knit wholesale and retail arrangements comprising a compact and efficient goods delivery system and a nationwide network of retail shops as well as department stores and supermarkets. Some also have hotel, restaurant, and catering services. This centralized system provides economies of scale, facilitating the distribution and import of larger volumes.

Independent importers and distributors: There are a number of importers and distributors in Sweden specialized in certain product segments, such as organic products or ethnic foods. These importers/distributors in turn sell to the large retail chains. These importers are ideal for exporters who cannot meet the high volumes required by the large retailers when dealing with them directly. Some specialized importers also supply the Hotel Restaurant and Institutional (HRI) sector.

Alcoholic Beverages: In Sweden, retail sales of wine and liquor are restricted to a government agency, Systembolaget, which handles all over-the-counter sales of wine, spirits, and full-strength beer through over 400 shops of its own throughout Sweden. Systembolaget purchases its products through eligible wine & spirits importers.

Trends

Store size: Smaller stores continue to lose market share to the larger supermarkets and hypermarkets.

Discount stores: While discount food stores in Sweden currently only account for 12.5%, volumes have tripled over the last ten years. The retail chains have developed discount store concepts in order to meet the increased competition from European discount chains such as German Lidl and Danish Netto which entered the market a few years ago.

Organic Products: The major retailers in Sweden are actively promoting organic products. Their own organic labels have gained broad recognition. Sales of organic food products are expected to increase by 10-12% in 2011 and gain market shares on behalf of conventional food products. The increase will mainly be seen at Ica and Axfood that today have a low share of organic products in their stores, about 2%, compared to Coop that has 10% organic products in their assortment.

Private Label: Retailers are aggressively promoting their own private label brands through TV commercials and newspaper ads. Of the three largest retailers, Axfood has the highest share of private label products 22%, Coop 20% and Ica 18%. Two of them have set a goal of 25 percent market share in each product segment for their private label products. This is especially true for far-away-imported products. For some popular categories in retail stores the figure is 50 percent. This development portends good potential for suppliers with private label capacity. The retail chains' comprehensive coverage of the whole country, combined with their vertically integrated structure (often imports, wholesale and retail trade are carried out within the same company), makes Sweden an interesting market for U.S. exporters seeking long-term stable and predictable sales.

Convenience shopping: As the consumers increasingly eat outside their homes, the large retailers find themselves not only to be competing with each other, but also with the HRI sector. To face this new competitor, supermarkets have developed deli sections in their stores with either ready-to-eat food products or partially cooked dishes. Menu suggestions next to the food products are also popular. The display of products has also become more consumer-oriented. For example, dressings and bread croutons can be found next to the pre-mixed salads, and coffee cakes may be placed next to the coffee section. Manufacturers with the capability to supply convenience foods may find interesting opportunities in this market.

Promotions/Marketing: Direct marketing in the form of newspaper-format advertisements is one of the most regularly used forms of communication in the Swedish retail market, and almost all the retail groups use this method as a means of conveying information to consumers. These are sent on a weekly basis to all the households in the immediate marketing area of the individual stores. The retailers also invest in advertising, primarily through their newspaper flyers, while producers and manufacturers spend most of their budgets on television advertising. Retail chains are also promoting their own private label products aggressively through TV commercials and advertisements.

Internet sales: Even though the computer/IT penetration in the Nordic countries is exceptionally high, retail food sales on the web have been very limited. The positive outlook that the large retailers had at the end of 1990's regarding selling food online changed rather quickly. The major food retail chains, Ica, Coop and Axfood, all terminated their internet grocery web sites during 2001-2003 due to few customers and low profitability. However, it seems that customers have overcome earlier suspicions to online food purchases and retailers have again started to offer food online.

Dinner Solution Deliveries: A few years ago, the concept of dinner solution deliveries entered the Swedish market. The companies provide their subscribers with a bag of groceries, with recipes and ingredients for 3-5 five dinners per week. The aim was to relieve the pressure on families regarding dinner planning and shopping. Also, there is a strong emphasis on the environmental benefits by reducing the need to drive to the store. This new Swedish version of online shopping is growing rapidly, especially in Sweden's larger cities. In addition, some of the companies have made their service available in other neighboring countries.

HRI/Food Service

The recent economic slowdown has been having an increasingly deep impact on the hotel and restaurant sector. However, after the week 2009, the total turnover for the restaurant sector grew about 5% to SEK 75 billion (USD 12 billion) in 2010. Cafés and fast food restaurants account for the largest increase.

Swedes are eating out more often, spending about the same as in other European countries. Possible reasons are that Swedes travel more and the increased number of restaurants and the varieties of restaurants. In addition, eating out on weekdays has become very common among the younger generation.

Changes in lifestyles and tastes are having significant effects on the catering sector of the market. The health trend continues to be important and restaurants are increasingly offering healthy alternatives on their menu. Fast food outlets often belong to national and international chains, while restaurants are most frequently family businesses. There are, however, some large international restaurant chains operating in this market including TGI Friday's and Subway. Also, there has been a significant expansion of coffee shop chains in the past few years. Institutions are mainly operated by municipalities, counties and government agencies.

From 1993-2010 the number of restaurant businesses in Sweden has increased from 13,600 to about 19,000. At the same time, the number of stores in the retail sector has been decreasing.

Distribution: Distribution within the HRI sector is dominated by a few large wholesalers specialized in supplying this sector. The dominant wholesalers are: Servera, Menigo Foodservice, Martin Olsson, Servicegrossisterna, Dafgårds, Svenska Cater and Axfood Närlivs.

Trends:

- Outside the home, restaurants continue to attract a significant proportion of consumers.
- American trends remain popular in Sweden.
- Informal, less expensive, “fast food” outlets continue to be popular. Subway, McDonald’s, Burger King, and Pizza Hut all have strong positions in this market.
- Increase interest in gourmet restaurants.
- Other U.S. chains such TGI Friday’s and Hard Rock Cafe can be found in Sweden.

Food Processing

The small populations of the Nordic countries provide somewhat limited foundations for a highly diversified food processing industry with sufficient economies of scale. Consequently, there have been consolidations of several companies and an increasing emphasis on exports of processed food items - especially cheese, candy, snack food and various jams and preserves. Since EU membership, there has been a move toward mutual investment and consolidation among Swedish food industries and joint Nordic cooperation in general. Several companies own and operate food manufacturing firms abroad.

The food processing industry in Sweden is large-scale and dominated by a few large private and cooperatively owned companies. Five large suppliers account for about 50 percent of the retail food store purchases. One or two suppliers control close to 100 percent of the market within some food segments. Farm cooperatives are powerful in Sweden's food industry. They have a virtual monopoly on domestically produced dairy products and are market leaders in the meat, milling, and bakery sectors. However, the majority of food industry companies are privately owned. These companies are active in the brewing, prepared fish, frozen food, sugar and tobacco sectors. The domestic food processing industry accounts for 80 percent of the food consumed within Sweden, which makes this an important sector for ingredient and raw product suppliers. Food processors either source their raw materials or ingredients directly from their suppliers or through wholesalers.

In 2010, imports of agricultural products and foodstuffs to Sweden totaled SEK 95 billion (USD 15 billion), an increase by 2 percent from 2009. Sweden’s foodstuff exports totaled SEK 54 billion (USD 8 billion).

Imports destined for the food processing sector include vegetables, fruit, juice, spices, coffee, and cocoa as well as seafood. About 40 percent of all imports are products that cannot be grown in Sweden.

Dominant companies by sector are: Arla Foods (dairy), Swedish Meats (meat processing), Paagens (bakery), Cerealia (milling and bakery), Findus (fish processing), Löfbergs Lila (coffee roasting).

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

- Authentic barbeque sauces and seasonings
- Beer
- Confectionery
- Convenience foods
- Dried fruit
- Ethnic food
- Fresh fruit
- Frozen vegetables
- Organic processed products including baby food
- Pancake/cake mixes
- Pet food
- Processed fruits & vegetables
- Rice and rice mixes
- Sauces
- Seafood
- Snack food
- Sugar-free products
- Tree Nuts
- Vegetarian processed products
- Wines

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

Foreign Agricultural Service
American Embassy
Dag Hammarskjolds Vag 31
S-115 89 STOCKHOLM, Sweden
Tel: (46-8) 783 5392/5470
Fax: (46-8) 662 8495
E-mail: agstockholm@usda.gov
http://stockholm.usembassy.gov/fas.html

Swedish Board of Agriculture
S-551 82 JONKOPING, Sweden
Tel: (46-36) 15 50 00
Fax: (46-36) 19 05 46
E-mail: jordbruksverket@jordbruksverket.se
www.sjv.se

National Food Administration
Box 622
S-751 26 UPPSALA, Sweden
Tel: (46-18) 17 55 00
Fax: (46-18) 10 58 48
Email: livsmedelsverket@slv.se

www.slv.se

Swedish Forest Agency
S-551 83 JONKOPING, Sweden
Tel: (46-36) 35 93 00
Fax: (46-36) 16 61 70
Email: skogsstyrelsen@skogsstyrelsen.se
www.skogsstyrelsen.se

Swedish Customs
Box 12854
S-112 98 STOCKHOLM, Sweden
Tel: (46-771) 520 520
Fax: (46-8) 20 80 12
www.tullverket.se

Statistics Sweden
Box 24300
S-104 51 STOCKHOLM, Sweden
Tel: (46-8) 506 940 00
Fax: (46-8) 661 5261
E-mail: scb@scb.se
www.scb.se

Association of Swedish Chambers of Commerce
Box 16050
S-103 21 STOCKHOLM, Sweden
Tel: (46-8) 555 100 00
Fax: (46-8) 566 316 35
www.cci.se

Swedish Federation of Trade
S-103 29 STOCKHOLM, Sweden
Tel: (46-10) 47 18 500
Fax: (46-10) 47 18 665
Email: info@svenskhandel.se
www.svenskhandel.se

A. KEY TRADE & DEMOGRAPHIC INFORMATION

SWEDEN	**2010**
Agricultural Imports From All Countries ($Mil)/U.S. Market Share (%)	14,802/1.2% *

Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%)	8,568/1% *
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%)	1,324/1% *
Total Population (Millions)/Annual Growth Rate (%)	9.1/ 0.16%
Urban Population (Millions)/Annual Growth Rate (%)	7.8/ 0.6
Number of Major Metropolitan Areas	4
Size of the Middle Class (Millions)/Growth Rate (%)	N/A
Per Capita Gross Domestic Product (U.S. Dollars)	39,100
Unemployment Rate (%)	8.4%
Per Capita Food Expenditures (U.S. Dollars)	3,053
Percent of Female Population Employed	62.9%**
Average Exchange Rate US$ 1 for 2010	7.205

* Source: Swedish Statistics
** Between ages 16 and 64, Source: SCB-AKU

Note: Above data on U.S. trade do not include substantial imports of U.S. products which are transshipped to Sweden via other EU countries.

TABLE B. CONSUMER FOOD & EDIBLE FISHERY PRODUCT IMPORTS

Sweden Imports (In Millions of Dollars)	**Imports from the World**			**Imports from the U.S.**			**U.S Market Share**		
	2008	2009	2010	2008	2009	2010	2008	2009	2010
CONSUMER-ORIENTED AGRICULTURAL TOTAL	8,504	7,561	7,820	120	118	132	1	1	1
	612	561	548	1	1	1	0	0	0

Snack Foods excl. nuts									
Red Meats, Fresh/Chilled/Frozen	900	768	805	0	0	0	0	0	0
Red Meats, Prepared/Preserved	342	301	325	0	1	5	0	0	0
Poultry Meat	199	171	176	0	0	0	0	0	0
Dairy Products (Excl. Cheese)	407	381	443	0	2	2	0	0	1
Cheese	510	459	488	0	0	0	0	0	0
Eggs	44	38	38	1	1	3	2	3	8
Tree Nuts	85	68	80	20	16	19	24	24	24
Fresh Fruits	832	679	724	5	4	4	1	1	1
Processed fruits and vegetables	803	758	719	35	39	37	4	4	5
Fruit & Vegetable Juices	222	160	147	1	0	0	1	0	0
Wine	669	631	631	16	15	17	2	2	2
Beer	112	113	108	4	4	4	2	3	4
Condiments	52	55	55	1	2	4	3	2	3
Pet Foods (Dog & Cat Food)	133	164	137	5	1	1	5	4	1
Other Consumer-Oriented Products	2,582	2,254	2,396	31	32	35	1	1	1
FISH & SEAFOOD PRODUCTS	2,675	2,590	3,249	12	11	13	1	0	0
Groundfish & Flatfish	223	111	177	1	0	0	1	1	1
Frozen fish/seafood	280	262	309	3	3	3	1	1	1
Salmon	1,245	1,349	1,803	1	1	1	0	0	0
Molluscs	13	11	11	1	1	1	9	6	6
Crustaceans	249	236	273	2	1	3	1	1	1
Other Seafood	665	621	676	4	5	5	0	1	1
AGRICULTURAL PRODUCTS TOTAL	10,986	9,581	10,134	189	179	174	2	2	2
AGRICULTURAL, FISH & FORESTRY TOTAL	15,990	13,694	15,275	231	223	227	1.4	2	1.4

Source: Global Trade Atlas

Note: Above data on U.S. trade do not include substantial imports of U.S. products which are transshipped to Sweden via other EU countries.

TABLE C. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS

Sweden – Top 15 Suppliers

CONSUMER-ORIENTED AG IMPORTS

$1,000	2008	2009	2010
Denmark	1751028	1448157	1469201
Netherlands	1391540	1242979	1330714
Germany	1238188	1085169	1106137
Italy	506720	461697	453339
France	452018	418842	383926
Spain	391446	347190	393945
Belgium	359980	338270	341672
Ireland	308184	250324	242193
Finland	260938	241207	264294
Poland	197376	201963	225324
United Kingdom	236053	198255	203943
United States	120296	117831	132218
South Africa	102547	99372	101463
Norway	125902	95348	105564
Austria	82588	69303	70472
Other countries	999420	948646	
World	8524224	7564553	7820022

FISH & SEAFOOD PRODUCT IMPORTS

$1,000	2008	2009	2010
Norway	2074288	2075601	2690088
Denmark	242415	207275	206504
China	64055	57624	58349
Netherlands	37095	29985	34300
Germany	27420	25263	26695
France	24093	22343	22081
Thailand	33262	19540	15217
Canada	21528	17639	24435
Finland	16289	17566	15177
Vietnam	13679	15721	16388
Poland	17163	14104	33226
United States	11632	11156	12987
Morocco	4897	11097	13404
Iceland	14401	10016	11107
Russia	7917	7842	15018
Other countries	69256	50506	54347
World	2679390	2593278	3249323

Source: Global Trade Atlas

Note: Above data on U.S. trade do not include substantial imports of U.S. products which are transshipped to Sweden via other EU countries.